

Message Text

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TO AMCONSUL SYDNEY

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E.O. 11652: N/A

TAGS: BEXP, AS, FBOL

SUBJ: TARGET INDUSTRY RESEARCH: PROCESS

CONTROL INSTRUMENTATION

REF: STATE A-8403, 10/5/73; SYDNEY A-33.

1. SUBJECT STUDY PREPARED BY PRICE WATERHOUSE ASSOCIATES
RECEIVED IN COMMERCE 3/26/74. WHILE IT IS GENERALLY WELL
RESEARCHED AND WELL PREPARED, THERE REMAIN SEVERAL PROBLEMS
REQUIRING FURTHER CLARIFICATION.

A) TABLE 1 IN APPENDIX SHOWS '71, '72, '73 AND '74
ELECTRIC/ELECTRONIC PC INSTRUMENT EXPORT ESTIMATES
CLOSELY APPROXIMATE PRODUCTION ESTIMATES, AND
'78 EXPORT PROJECTION ACTUALLY EXCEEDS PRO-
DUCTION. SIMILARLY, NON-ELECTRIC/ELECTRONIC
PC INSTRUMENT EXPORT ESTIMATES EXCEED PRO-
DUCTION FIGURES IN '70, '72, '73, '74 AND '78.

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AUSTRALIA DOES NOT PRODUCE LARGE VOLUMES OF EITHER

CATEGORY ABOVE. IT DOES, HOWEVER, PRODUCE AUTOMATIC VALVES, YET EXPORT ESTIMATES FOR THESE FALL CONSISTENTLY FAR BELOW PRODUCTION FIGURES. THEREFORE, REQUEST RESEARCHER EXPLAIN WHY AUSTRALIA EXPORTS INCREASINGLY GREATER QUANTITIES OF GOODS IT HARDLY PRODUCES AND WHY IT DOES NOT EXPORT IN GREATER VOLUME THOSE IT DOES PRODUCE.

B) ARE TABLE 3 FIGURES DOLS U.S. OR DOLS AUSTRALIAN?

C) HOW WERE INDUSTRY PERCENT CONTRIBUTIONS TO GNP AS GIVEN IN TABLE 4 CALCULATED? AUSTRALIA'S FY'72 GNP WAS APPROXIMATELY DOLS U.S. 42.2 BILLION. YET WHEN GIVEN PERCENTAGES ARE TAKEN, NEITHER VALUE ADDED FIGURES NOR VALUE OF SALES FIGURES ARE DERIVED. SIMILARLY, WHEN GNP IS CALCULATED USING VALUE OF SALES AND PERCENT CONTRIBUTION, FIGURE DERIVED IS MUCH TOO HIGH. WHEN VALUE ADDED IS USED, CALCULATED GNP IS TOO LOW.

D) CONSISTENT WITH PAGE 25, PARAGRAPH 3 OF STUDY AND SECTION 3.31.02B OF SPECIFICATIONS, REQUEST RESEARCHER FURNISH FOR '72, OR MOST RECENT YEAR, FOLLOWING ADDITIONAL INFORMATION NEEDED FOR A MORE COMPLETE VIEW OF INDUSTRY MARKETS FOR PC INSTRUMENTS:

1) TOTAL NUMBER OF ESTABLISHMENTS IN NATURAL GAS LIQUIDS INDUSTRY.

2) TOTAL NUMBER OF EMPLOYEES IN NATURAL GAS LIQUIDS INDUSTRY.

3) TOTAL NUMBER OF EMPLOYEES IN PRIMARY METALS INDUSTRY.

STATEMENT IN THIS REGARD ON PAGE 33 OF STUDY DOES NOT ADEQUATELY PROVIDE THE INFORMATION REQUESTED. IT DOES NOT FOR EXAMPLE ACCOUNT FOR SEMI-PRIVATE OR PRIVATE PUBLIC UTILITY ESTABLISHMENTS THAT MAY EXIST.

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E) IN ACCORDANCE WITH SECTION 3.33.01-02 OF SPECIFICATIONS, REQUEST RESEARCHER PROVIDE FOLLOWING ADDITIONAL INFORMATION NEEDED TO FULLY OUTLINE INDUSTRY SECTOR PROFILES:

1) FOR ELECTRICITY GENERATION AND DISTRIBUTION SECTOR,

-TOTAL OUTPUT FOR SECTOR IN '71, '72 OR '73.

TOTAL CAPACITY FOR '71 IS GIVEN ON PAGE 37, PARAGRAPH 4, BUT HERE THE BREAKDOWN BY GEOGRAPHIC AREA DOES NOT SUM TO TOTAL CAPACITY FIGURE GIVEN.

-NUMBER OF LARGE ENTERPRISES IN SECTOR AND APPROXIMATE PERCENTAGE OF TOTAL SALES OR PRODUCTION ACCOUNTED FOR BY THESE FIRMS.

2) FOR THE NATURAL GAS PRODUCTION AND DISTRIBUTION SECTOR,

-TOTAL NUMBER OF ENTERPRISES IN SECTOR IN '70 OR MOST RECENT YEAR AVAILABLE.

-TOTAL OUTPUT VOLUME OF SECTOR IN '70 AND IN '71 OR '72 IF AVAILABLE.

-NUMBER OF LARGE ENTERPRISES IN SECTOR AND APPROXIMATE PERCENTAGE OF TOTAL SALES OR PRODUCTION ACCOUNTED FOR BY THESE FIRMS.

-CURRENT LEVEL OF CAPITAL INVESTMENT IN SECTOR OR LEVEL FOR THE MOST RECENT YEAR AVAILABLE.

3) FOR INDUSTRIAL INORGANIC CHEMICALS MANUFACTURING SECTOR,

-NUMBER OF LARGE ENTERPRISES IN SECTOR,

4) FOR PAPER MILLS SECTOR,

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-CLARIFICATION OF PAGE 53, PARAGRAPH 5, SENTENCE 1. APPENDIX F-1 OF SPECIFICATIONS DELINEATES BY SIC NUMBER FOUR SECTORS INCLUDED IN PAPER AND PAPER PRODUCTS INDUSTRY. PAPER MILLS SECTOR IS BUT ONE OF THESE, YET ON PAGE 53, PARAGRAPH 5, FACTORIES PRODUCING WOODPULP, PAPER AND PAPERBOARD ARE INCLUDED IN THE PAPER MILLS SECTOR CATEGORY. THIS INCLUSION RAISES TWO QUESTIONS WHICH REQUIRE CLARIFICATION.

FIRST, DID RESEARCHER INCLUDE FIGURES FOR PULP MILLS SECTOR, PAPERBOARD MILLS SECTOR, AND PAPER MILLS SECTOR ON PAGE 53?

IF SO, THEN RESULTING IMPLICATIONS ARE
THAT OUT OF TOTAL INDUSTRY SALES OF
DOLS U.S. 1,011 MILLION IN 1972 AS GIVEN
IN TABLE 4, THESE THREE SECTORS TOGETHER
ACCOUNTED FOR DOLS U.S. 401 MILLION. THE
BUILDING PAPER AND PAPERBOARDS INDUSTRY
WOULD THEREFORE BY ITSELF ACCOUNT FOR
DOLS U.S. 610 MILLION. THIS SEEMS UNLIKELY.
SECOND, DOES NARRATIVE ON PAGE 53 PARAGRAPH
5 MEAN THAT THE WOODPULP AND PAPERBOARD
MENTIONED IS PRODUCED ONLY BY THE 21
FACTORIES WHICH ARE PRIMARILY PAPER MILLS?

-ONCE THE TERM "PAPER MILLS SECTOR" HAS
BEEN ADEQUATELY DEFINED AND ITS COM-
POSITION CLEARLY DELINEATED, REQUEST
RESEARCHER PROVIDE ALL INFORMATION AND
REVISED FIGURES CONSISTENT WITH SECTION
3.33.02 (A) THROUGH (H) OF SPECIFICATIONS.

2. WE REQUEST POST OBTAIN ABOVE INFORMATION FROM
CONTRACTOR AND TRANSMIT FOR COMMERCE NO LATER THAN MAY 15, 1974.
PAYMENT AUTHORIZATION WILL FOLLOW COMMERCE APPROVAL OF RESPONSE.

3. CONTRACTOR SHOULD BE REMINDED THAT MARKET RESEARCH STUDY
IS NOT ONLY USED IN PREPARING COMMERCE'S COUNTRY MARKET SURVEY,
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BUT IS ALSO MADE AVAILABLE ON LOAN IN ITS ENTIRETY TO AMERICAN
BUSINESS COMMUNITY. THUS ACCURACY AND CLARITY OF PRESENTATION
ARE ESSENTIAL. PROBLEMS OF CLARITY, GRAMMATICAL USAGE AND
TYPOGRAPHICAL ERRORS OCCUR THROUGHOUT STUDY. FOR EXAMPLE
PAGE 9, PARAGRAPH 2 SENTENCE 1 LENDS ITSELF TO THREE INTER-
PRETATIONS: A) OF ALL IMPORTS INTO AUSTRALIA FROM ALL COUNTRIES,
PC INSTRUMENTS FROM THE U.S. SHOULD CONTINUE TO BE THE MAJOR
IMPORTS SOLD IN THE NEXT FIVE YEARS; B) OF ALL IMPORTS FROM
THE U.S. INTO AUSTRALIA, PC INSTRUMENTS SHOULD CONTINUE TO
BE THE MAJOR U.S. IMPORTS SOLD IN THE NEXT FIVE YEARS;
C) OF ALL IMPORTS OF PC INSTRUMENTS INTO AUSTRALIA, THOSE
FROM THE U.S. SHOULD CONTINUE TO BE THE MAJOR PC INSTRUMENTS
SOLD IN THE NEXT FIVE YEARS.

IN SENTENCE 2 OF SAME PARAGRAPH, USE OF "U.S. IMPORTS" IS
MISLEADING. "IMPORTS FROM THE U.S." SHOULD BE USED INSTEAD.

EXAMPLES OF GRAMMATICAL AND TYPOGRAPHICAL ERRORS INCLUDE:

- PAGE 20 PARAGRAPH 3, SENTENCE 3; SUBJECT/VERB
DISAGREEMENT.

- PAGE 45, PARAGRAPH 1; "EXEMPLOYED" AND PARAGRAPH 3;
"PROPOSECTS."

- THIRD PAGE OF TRADE LIST, UNDER "KRAFT FOODS"; THE
"MISCELLANEOUS FOOD MANUFACTURING SECTOR" IS CLASSIFIED
UNDER U.S. SIC CATEGORY 299, BUT IT SHOULD BE CLASSIFIED
UNDER 209.

COMMERCE DOES NOT REPEAT DOES NOT REQUEST THAT THE DEFICIENCIES
PARA. 3 ABOVE BE CORRECTED ON SUBJECT STUDY. HOWEVER, COMMERCE
WISHES CONTRACTOR BE MADE AWARE OF PROBLEMS TO ENSURE THAT
APPROPRIATE REVIEW AND EDIT PROCESS IS PERFORMED ON POSSIBLE
FUTURE STUDIES. KISSINGER

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